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ABSTRACT

Developed by Portland Community College's (PCC's) Institute for Community Assistance, this guidebook provides checklists of steps that need to be followed in the development and delivery of new, experimental, and custom-designed programs for the community. The booklet begins by explaining the function of the Institute in assisting PCC staff in developing programs for the public and private sectors. It then covers 14 major topics: (1) identifying target customers in the private, public, non-profit, and small busines sectors; (2) planning for the first contact with the potential customer; (3) sitting down with the customer and assessing the educational and training needs of the organization; (4) assessing PCC's ability to deliver the services requested; (5) pricing the service; (6) writing a special agreement for contracted services; (7) promoting and publicizing the program; (8) arranging for textbooks; (9) dealing with employment, facilities, equipment, and support services requirements; (10) checking last minute details; (11) registering the students; (12) billing the customer; (13) evaluating the program; and (14) conducting a customer follow-up. Appendices provide a tuition pricing schedule, a sample special agreement for contracted services, and sample employment, registration, evaluation, and scheduling forms. (AYC)

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USER'S GUIDE
TO
EDUCATIONAL MARKETING

A practical approach for responding to community needs

INSTITUTE FOR COMMUNITY ASSISTANCE
Portland Community College

We sincerely hope this User's Guide to Educational Marketing will be of practical assistance to you as you reach out to meet the many needs of our community. Please call on the ICA staff for any additional assistance that we can provide to you.

JC 810 527

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THE INSTITUTE FOR COMMUNITY ASSISTANCE

What is it?

The Institute for Community Assistance (ICA) is the educational marketing outreach for Portland Community College. Through the ICA new, experimental, and/or custom designed programs can be developed and offered to customers in both the private and public sectors including business, industry, government, nonprofit institutions, social service agencies and professional organizations.

In addition the Institute for Community Assistance is available to assist PCC staff in the development and delivery of programs by the instructional departments or as a campus outreach. To assist in this effort, the ICA staff has developed this user's guide to educational marketing. We hope you will find this guide both helpful and practical.

The guide is designed around a checklist format for each major topic. This approach indicates critical steps that need to be followed as well as PCC policies and procedures that need to be adhered to in the development and delivery of new, experimental, and/or custom designed programs for the community.

Please let the Institute for Community Assistance staff know if we can help you in any way.

For the purpose of this user's guide, a "custom designed program" is any educational activity offered to a specific customer that does not appear in a PCC class schedule. A custom designed program may be comprised of already approved PCC courses or may be new and/or experimental activities designed expressly for a specific organization.

IDENTIFYING THE CONSUMER

Who's out there?

In exploring potential customers for custom designed programs the following occupational categories in both the public and private sectors should be considered:

Private Sector

- ☐ Retail businesses (large and small)
- ☐ Utilities
- ☐ Wood products
- ☐ Transportation
- ☐ Textiles
- ☐ Heavy Manufacturing
- ☐ Electronics and precision manufacturing
- ☐ Food processing
- ☐ Insurance, banking, real estate and securities

- ☐ Health care
- ☐ Entertainment
- ☐ Newspapers, printers, and publishers
- ☐ Hospitality (lodging, restaurants, and resorts)
- ☐ Automobile/truck sales and service
- ☐ Data processing sales and service
- ☐ Proprietary schools
- ☐ Etc., etc.!

Public Sector Organizations

- ☐ Local government agencies
- ☐ County government agencies
- ☐ State government agencies
- ☐ Regional government agencies
- ☐ Federal government agencies
- ☐ Educational institutions
- ☐ Etc., etc.!

Nonprofit Organizations

- ☐ Nonprofit agencies
- ☐ Professional organizations and societies
- ☐ Trade/Professional Unions
- ☐ Etc., etc.!

For more detailed information refer to, **Portland SMSA – 100 Largest Employers** (metro area), available through Economic Development Division, Portland Chamber of Commerce, 824 S.W. Fifth Avenue, Portland, Oregon 97204.

Employers and employees in both the public and private sectors often are in need of four types of custom designed programs:

- ☐ Skill building and job upgrading education and training
- ☐ General Education
- ☐ Continuing education to meet ongoing job requirements, professional obligations, or legislative mandates.
- ☐ Consulting and advice on specific organizational problems and issues.

Small Businesses

- ☐ Don't forget to consider the training and education needs of the thousands of **small businesses** in the PCC district. These potential customers often have from one to five employees and usually don't

receive the attention from educational institutions that the larger organizations receive. In many cases a custom designed program can be developed to serve the needs of employees from more than one small business. This "clustering" allows for a reasonable number of students to explore the same issue or skill area. Contact ICA for more information regarding the needs of small businesses.

CONTACTING THE CUSTOMER

There is more than one way

Once you have identified a potential customer (section 2) or once a customer has made an initial contact with you, planning needs to take place in preparation for meeting with the customer.

If you have identified a potential customer and are ready to make a contact, the following should be considered:

- ☐ Decide carefully the "key" person to contact in the organization. This individual should be a decision maker who has the authority and background to discuss and authorize a custom designed program agreement with Portland Community College.

- ☐ This key person might be the organization's president, vice president, executive director, general manager, training officer, personnel manager, etc. For an up-to-date directory of key personnel in the Portland Metropolitan area ask for, **Contacts Influential.** This directory is available through the ICA.

- ☐ Before meeting with the customer, have in mind a number of PCC instructional program areas that might be of interest to that organization, i.e., word processing, management/supervisory development, general education, technical training, data processing, etc.

- ☐ Also, be able to suggest flexible time schedules for presenting the program, as well as various program lengths such as workshops, seminars, or full-length courses, etc.

- ☐ Methods of contacting a customer might include: Visiting the organization without an appointment but with an ICA brochure and other PCC materials; mailing an ICA brochure and other PCC material to the "key" person and following up in three days with a phone call for an appointment; calling the organization and saying only enough to get an appointment with the key person; be referred to the key person by a friend or business associate. Ask the ICA for other suggestions and/or assistance.

- ☐ Before going to the first appointment with the customer be sure and learn as much as possible about the organization's product(s) and/or service(s).

- ☐ Take supportive materials that might be helpful at the first meeting including the ICA brochure, PCC program brochures, the "pricing schedule" (see section 6), a sample of the "special agreement for contracted services" (see section 7), and a "needs assessment" (see section 4). You might take this material in a new folder with the organization's name typed on the tab.

- ☐ Be sure and ask for the name, title, and telephone number of the organization's contact person to work with after the first meeting.

In cases when the customer contacts you to explore the possibility of a custom designed program, be sure and secure the following information:

- ☐ Name of person calling
- ☐ Name of organization
- ☐ Reason for calling
- ☐ Ask for a contact person and follow-up appointment, if appropriate.
- ☐ The phone number for future contacts

SITTING DOWN WITH THE CUSTOMER

Find out what the customer wants and what PCC can offer

After you have identified the customer (see section 2) and have contacted the customer (see section 3) you are ready to sit down with the customer. This important process will provide you the opportunity to find out what kind of program the customer wants PCC to design and offer.

It is critical that you find out the following information in this "needs assessment" process:

- ☐ What skill or education activity does the customer want PCC to respond to?
- ☐ What job categories of employees will be involved (supervisory, production, clerical, management, etc.)?
- ☐ How many employees will be involved?
- ☐ What kind of a timeline does the customer have in mind as to a starting date to begin the custom designed program?
- ☐ What time of the day and/or week will be best for the training/education to take place?

- ☐ Will the employees participate in the program during their work time or during off hours?
- ☐ Will the program be primarily a lecture or lab (hands-on) activity?
- ☐ What type of instructor background will be required to successfully teach the program?
- ☐ Will a textbook or other specific instructional materials be required?
- ☐ Will the individual employee or the organization pay for the cost of the program?
- ☐ Does the customer want college credit or a certificate for successful completion of the program?
- ☐ If college credit is involved, will the employees want a letter grade or pass/no pass?
- ☐ Will there be any prerequisite knowledge or skills required of the employee before entering the program?
- ☐ How will the customer publicize the program to its employees?

After collecting this needs assessment information, you may need to say you will get back to the customer after analyzing the needs, pricing the service, and generally

discussing the proposal with your instructional administrator. **Remember the ICA staff is available as a resource to you in analyzing the customer's request.**

If at the time of meeting with the customer for the needs assessment you are pretty sure that PCC can deliver the requested service, you may want to discuss with the customer the following two items:

- ☐ Pricing the service (see section 6).
  (Give only an estimated price at this point.)

- ☐ The special agreement for contracted services (see section 7).

- ☐ Evaluating the success of the custom designed program (see section 14).

PCC's ABILITY TO DELIVER

Or can you do what you promised?

After conducting a "needs assessment" with the customer (see section 4) the next important step is to decide whether or not PCC can deliver the requested education or training. In making this decision, the following considerations need to be kept in mind:

- ☐ The ongoing instructional departments/divisions will always have the first opportunity to decide whether or not they have the expertise, resources, and time to do the job. ICA can be of assistance in helping you evaluate the customer's need and design a program to respond to that need.

- ☐ However, if for whatever reason one of PCC's instructional departments/ divisions cannot or choose not to respond to a customer's request, the Institute for Community Assistance must be notified before the customer is told PCC cannot meet the customer's need. This ICA notification will give the college another perspective and a last chance to evaluate the customer's request. It may be that ICA is aware of other resources, ideas, or avenues that would result in a successful response and a custom designed program.

- ☐ If ICA is in contact with a customer for a custom designed program request, ICA will notify the vice president for educational services in writing as to the nature of the request. The vice president for educational services will have **ten (10) working days** in which to respond in writing to ICA as to whether or not the appropriate instructional department will or will not respond to the customer's request.

PRICING THE SERVICE

Don't give away the store.

The correct pricing of a custom designed program is critical for two reasons: pricing the program too low will result in the college losing money; pricing the program too high may result in dissatisfied customers who feel the college is taking advantage of them and who will not return to PCC for other business.

To assist you in this important pricing process, the College has developed a **Tuition Pricing Schedule for Contracted Classes** (see appendix A of this user's guide). The pricing schedule is based on a minimum and maximum price depending on the number of students enrolled in a particular custom designed program.

Remember that all price quotations contained in a special agreement for contracted services **must be reviewed by the Institute for Community Assistance** before being submitted to the president for signature and prior to being forwarded to the customer for signature.

WRITING A SPECIAL AGREEMENT FOR CONTRACTED SERVICES

Don't forget it's a legal document.

The following considerations must be attended to in the development of a special agreement for contracted services:

- ☐ Review the sample, "special agreement for contracted services," found in appendix B of this user's guide. **This format is to be followed for all special agreements.**

- ☐ **The final draft of the special agreement must be reviewed by the ICA before the final copy is prepared.** This will allow review of the educational and legal components of the agreement for accuracy and format.

- ☐ **The PCC president signs all special agreements as the college representative.** The ICA will secure this signature.

- ☐ The ICA will make the appropriate number of copies of the special agreement and will forward copies to the customer for signature.

☐ The signed customer copy will be returned to the ICA. The original will be placed in the central file and a copy will be forwarded to the appropriate instructional and business departments (when applicable).

PROMOTION AND PUBLICITY

Who is going to do what?

Organizations that contract with PCC for custom designed programs often look to the college for ideas on how to promote and publicize the activity within their organization. The following ideas can be used for in house promotion and publicity:

- ☐ Have organization prepare a brochure or information sheet that could be distributed with paychecks, posted on bulletin boards, distributed at meetings, etc.
- ☐ Include program information in newsletters and other communication networks within the organization.
- ☐ Make sure the key managers talk with their department employees about the program.
- ☐ Work closely with the organization's training officer and/or key managers in exploring other publicity networks unique to their organizations.
- ☐ Contact the ICA for other suggestions.

TEXTBOOKS

Don't forget planning for this one.

Many custom designed programs will require textbooks. The following checklist relates to this item:

- ☐ Determine with the customer and the instructor if a textbook(s) is going to be used.

- ☐ If a textbook(s) or related materials are going to be used order them through the PCC bookstore in plenty of time in order that the items arrive **before** the first class.

- ☐ Determine with the customer whether the organization or the individual employee is going to pay for the textbook.

- ☐ If the organization is going to pay for the textbook(s) the instructor can check the textbook(s) out of the PCC bookstore and take them to class and distribute them to the students. In order for the instructor to take the textbooks, the bookstore will require a signed copy of the special agreement between PCC and the customer. (This agreement will come from the department chairperson or from the ICA.) The bookstore will also require the instructor to secure a signed list of students that received a textbook(s). This list is to be returned to the bookstore. The bookstore will bill the customer for the appropriate number of textbooks from this list.

- ☐ If the individual employee is going to pay for the textbooks, the easiest method to use is to have the employee buy the textbook(s) at the PCC bookstore nearest to their place of employment. This purchase can be made after the first class session, or prior to the first class session if the student has preregistered through their employer and can be alerted that the textbook(s) are available at a specific PCC bookstore.

- ☐ If the employee is paying for the textbook(s) and arrangement cannot be made to have the textbooks available at a PCC bookstore, make sure that the instructor or whoever is helping with registration collects the textbook money with a **separate** check or money order. This money must be returned to the bookstore promptly with a signed list of students who bought a textbook(s).

- ☐ Any textbooks not sold must be returned to the bookstore by the instructor or the person responsible **within three weeks** of the first day of class.

☐ Textbook(s) used in a custom designed program but **not** purchased through the PCC bookstore should be delivered directly to the students by the instructor.

SUPPORT SERVICES

Make these plans ahead of time.

Advance planning for the support services is a very important aspect of a successful custom designed program. Don't forget to make the following plans.

When the custom designed program is to take place at a PCC facility:

- ☐ Be certain the instructor(s) has been approved by PCC to teach the course, workshop or seminar.
- ☐ Prepare necessary Confirmation of Employment (COE) and Personnel Employment Authorization (PEA) forms (see appendixes C and D of this user's guide).
- ☐ Prepare necessary Class Schedule Sheet (4-plys) forms (see appendix E of this user's guide).
- ☐ Make arrangements for room use at the appropriate PCC campus/center.
- ☐ Make arrangements with PCC food services for specific meal(s) and coffee break(s) needs.
- ☐ Contact instructor(s) and determine audio-visual equipment needs and make appropriate arrangements with the PCC audio-visual department.

- ☐ Contact instructor(s) and determine film, filmstrip, and slide needs and make arrangements with the PCC film booking department.

- ☐ Contact instructor(s) and determine instructional material needs and make arrangements with the PCC instructional materials department. (Be sure and provide IMC adequate lead time in order that the class materials will be ready in time.)

- ☐ Contact the PCC security department for parking permits (if needed) and mail to the participants.

- ☐ Alert the appropriate PCC information center(s) and switchboard(s) in order that they will be prepared to direct participants to the correct room or facility.

- ☐ Prepare appropriate sign(s) for room doors or other facilities that will help direct participants to the proper place.

- ☐ Collect and organize appropriate registration materials (if needed).

- ☐ Prepare "registration sign" for a temporary registration area, if needed.

- ☐ Make textbook arrangements, if needed (see section 9).

When the custom designed program is to take place at the customer's facility:

- ☐ Be certain the instructor(s) has been approved by PCC to teach the course, workshop or seminar.

- ☐ Prepare necessary Confirmation of Employment (COE) and Personnel Employment Authorization (PEA) forms (see appendix C and D of this user's guide)

- ☐ Prepare necessary Class Schedule Sheet (4-ply) forms (see appendix E of this user's guide)

- ☐ Make arrangements for facility and room use.

- ☐ Make arrangements for specific meal(s) and coffee break(s) needs.

- ☐ Contact instructor(s) and determine audio-visual equipment needs and make appropriate arrangements utilizing customer's equipment or PCC equipment.

- ☐ Contact instructor(s) and determine film, filmstrip, slide needs and make appropriate arrangements utilizing the customer's resources or PCC film booking.

- ☐ Contact instructor(s) and determine instructional material needs and make appropriate arrangements utilizing customer's resources or PCC's instructional material department. (Be sure and provide IMC adequate lead time in order that the class materials will be ready in time).

- ☐ Make arrangements for parking for PCC staff

- ☐ Make arrangements for security clearance for PCC staff (when applicable).

LAST MINUTE DETAILS

Or people will be people

In spite of all your planning and confidence that things will go off as planned, our experience is that the following items, when applicable, should be checked close to the start of a custom designed program.

When activity is at a PCC facility, the following last minute items should be confirmed:

- ☐ Food service arrangements
- ☐ Coffee breaks, a.m. and p.m.
- ☐ Parking permits
- ☐ Room arrangements and reservations
- ☐ Audio visual equipment arrangements and reservations
- ☐ Film, video tape, etc. arrangements and reservations
- ☐ Instructional materials handouts
- ☐ Information centers alerted to direct individuals looking for class

- ☐ Supplies including marking pens, tape, drawing pads, easels, receipt forms, registration forms, etc.
- ☐ Name tags
- ☐ Textbook(s)

When activity is at the customer's facility, the following last minute details should be confirmed:

- ☐ Room arrangements
- ☐ Food services
- ☐ Directions for staff member(s) on how to get to customer's facility.
- ☐ Parking area for PCC staff member(s)
- ☐ Audio-visual equipment
- ☐ Film, video tape arrangements
- ☐ Instructional materials handouts
- ☐ Supplies including marking pens, tape, drawing pads, easels, receipt forms, registration forms, etc.
- ☐ Name tags
- ☐ Textbook(s)

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Section

REGISTERING THE STUDENTS

This should be a pleasant experience for you and the customer.

Registering students for a custom designed program can be a smooth process for PCC staff involved if good planning takes place prior to registration. Otherwise, the registration process can be a never ending series of problems and frustrations. The following checklist should be helpful in planning for custom designed program registration.

- ☐ First determine if registration is going to take place at a PCC facility or at the customer's location.
- ☐ If registration is gojng to take place at a PCC facility, remember to have a Class Schedule Sheet prepared (see appendix E) and use the Special Registration Form, CEO 052 (see appendix F of this user's guide).
- ☐ If registration is going to take place at the customer's facility remember to have a Class Schedule Sheet prepared (see appendix E) and use the Special Registration Form CEO 052 (see appendix F of this user's guide).
- ☐ Some customers will be able to preregister their employees before the beginning of classes. A preregistration process will give you and the customer an indication of the employee interest before classes begin.

- ☐ When using the "Special Registration Form" we suggest you have all the information on each form filled out prior to student registration. This will leave the student with only their social security number, name, address, phone number, etc. to complete. **Remember to have the students press hard on the form so it will record on all copies.**

- ☐ If money is to be collected at the time of registration, c[illegible]ks and money orders are the easiest to deal with. **(Remember that textbooks must have a separate check or money order made out to "PCC Bookstore." (See section 9, Textbooks).**

- ☐ In many cases the organization will be buying the custom designed program for its employees. In this situation, the individual students pay no money to PCC but must fill out the Special Registration Form, CEO 052 (see appendix F) for registration purposes. In any case, the student retains the white or top copy of the registration form as his/her receipt.

- ☐ Deferred tuition may be available to custom designed program students. Check with the ICA for details.

BILLING THE CUSTOMER

We need to be paid for our services.

The customer billing requirements are contained in the "Special Agreement for Contracted Services" (see section 7). This agreement will identify the following billing information:

- ☐ The amount to be billed.
- ☐ The date, month, or school term the customer is to be billed.
- ☐ The customer's billing address and name of person to be billed.
- ☐ The billing code, course number(s), and course section number(s).

The ICA will forward to the PCC business office a signed copy of the special agreement. **The business office will automatically bill the customer in accordance with the terms of the special agreement.** (Unless otherwise notified by the ICA).

14
Section

EVALUATING THE CUSTOM DESIGNED PROGRAM

This process will give you valuable information for the future.

Evaluation as to the effectiveness of the custom designed program should be based on measurement of the outcomes that the customer and you expected. The evaluation format should be discussed and agreed upon by the customer during the program planning stage (see Section 4). Various program evaluation possibilities include the following (which may be in combination).

- ☐ Student evaluation (see appendix G for example).
- ☐ Customer evaluation
- ☐ PCC staff evaluation (see appendix H for example).

Remember to approach the program evaluation from a positive direction in order that the process will promote improvement rather than discouragement.

CUSTOMER FOLLOW-UP

Find out where the customer wants to go from here.

Most customers will be eager to do further business with Portland Community College if they have had a successful, pleasant experience the first time around. Effective customer follow-up that will help ensure a continuing relationship with the customer should involve the following transactions:

- ☐ Review with the customer the program evaluation forms completed by the students or by other officials from the customer's organization or from PCC. Discuss strengths and weaknesses and ways to improve the program the next time it might be offered.

- ☐ Discuss the possibility of continuing with the next step of the custom designed program just completed (if appropriate).

- ☐ Discuss with the customer other custom designed program needs that PCC might design and deliver.

- ☐ Review with the instructor the student evaluation forms and other feedback from the customer that would result in an improved program.

- ☐ Review with the ICA your experience with the custom designed program. The ICA staff may be able to learn from your experience or may be of assistance as you continue to work with the customer.

APPENDIX A

Tuition Pricing Schedule for Contracted Classes

TUITION PRICING SCHEDULE FOR CONTRACTED CLASSES

I. **PCC PAID INSTRUCTOR**

A. **Minimum** amount to be charged is the **current tuition rate** for **sixteen (16) enrollments** even if less than sixteen are enrolled.

B. **Maximum** amount to be charged is the **current tuition rate** for **twenty-five (25) enrollments** even if more than twenty-five are enrolled.

C. In addition to the minimum and maximum tuition rates noted in A and B above, all special agreements for contracted services must include charges for such **additional items** as curriculum development, supplies, equipment, extraordinary mileage or travel, extraordinary clerical support, etc. **Please contact ICA for assistance regarding these additional charges.**

II. **CUSTOMER PAID INSTRUCTOR/CUSTOMER'S FACILITY**

A. In those cases when the customer pays the instructor, provides the facility, and covers all other expenses, the customer is to be charged **$10.00 per enrollment per course or activity per term** (minimum of sixteen (16) enrollments even if less than sixteen are enrolled).

III. **CUSTOMER PAID INSTRUCTOR/PCC FACILITY**

A. In those cases when the customer pays the instructor and PCC provides the facility, the customer is to be charged **$10.00 per enrollment per course or activity per term** (minimum of sixteen (16) enrollments even if less than sixteen are enrolled), plus, $12.00 per credit hour per term, or $1.00 per clock hour per term (minimum charge $12.00).

APPENDIX B

Special Agreement For Contracted Services

Portland Community College
12000 S.W. 49th Avenue Portland, Oregon 97219 (503)244-6111

SPECIAL AGREEMENT FOR CONTRACTED SERVICES

THIS AGREEMENT is entered into this day of , 19 , by and between Portland Community College, hereinafter referred to as "the College" and

(ORGANIZATION'S NAME IN CAPS, address, zip code), hereinafter referred to as *"(Organization's Abbreviation)."*

WHEREAS, *(Organization's Abbreviation)* desires to engage the College to render special educational services,

THEREFORE THE PARTIES AGREE AS FOLLOWS:

A. The College will provide the following:

1. *(Write out number of days) (#)* days of educational service in *(state activity or course title and course number)* for *(write out number of hours) (#)* hours per day, on *(state time where needed and day(s) of the week)* at *(name, address and zip code of location).*

2. The first day of the educational service will begin on *(day of the week, month, day, year),* and, the service will be completed by *(day of the week, month, day, year).*

(If there are any additional services, classes, or sections within this contract, they are to be listed as a continuation of .)

COLLEGE BOARD: Father Bill Hamilton, *chairman* • Earl Blumenauer • Howard Cherry • N. Becky Mansfield • Lynda A. Mayo • Carl Piacentini • Jeannette Saucy
PRESIDENT: John H. Anthony

3. *(Write out number) (#)* hours credit will be granted, in accordance with College procedure, to those students who have passed the course as indicated by the instructor of the class attended.

(If no college credit is provided by PCC, section A-3 is to be eliminated from the agreement.)

4. Payment for instruction will be at the salary schedule approved by the Portland Community College Board of Directors.

(If the instructor is paid directly by the customer, section A-4 will be eliminated from this agreement.)

B. The staff assigned to develop, coordinate and conduct the educational service(s), as stated in section A-1, will be certified in accordance with the standards on file with the Oregon Board of Education, and/or by documented experience and credentials that will be acceptable to *(Organization's Abbreviation)*.

C. *(Organization's Abbreviation)* may arrange only with the assigned college administrator to hold or not to hold a portion of the educational service(s) at the particular time(s) designated by this agreement in sections A-1 and A-2.

D. *(Organization's Abbreviation)* will provide not less than *(write out number) (#)* participants for the educational service stated in A-1 above.

(If there is a maximum limit to the number of participants in the educational service(s) stated in section A-1. This maximum limit is to be

stated in section D, also.)

E. The College will be compensated for all services rendered and expenses incurred to conduct the educational service(s) in the amount of *(write amount in words and numbers)* ($).

(If there are any additional payments to the College to be made for such items as additional tuition, textbooks, supplies, materials and/or equipment, identify each item as a subtopic 1, 2, 3, etc. of section E.)

F. The College will bill *(Organization's Abbreviation)* at the completion of the educational service(s), for payment within thirty (30) days.

(FULL NAME OF ORGANIZATION)

By _____

Title _____

Date _____

PORTLAND COMMUNITY COLLEGE

By _____

Title President

Date _____

Billing Code:

Section No. :

APPENDIX C

Confirmation of Employment
(COE)

NOTIFICATION OF TEACHING ASSIGNMENT

DIVISION

DEPARTMENT

BUDGET ACCOUNT NO.

PAYROLL NO.

DATE

PORTLAND COMMUNITY COLLEGE
PERSONNEL OFFICE · 12000 S.W. 49th Ave.
PORTLAND, OREGON 97219 · PHONE 244-6111

SOC. SEC. NO.

PERS NO.

TO:

Please refer to schedule following for further information, including your estimated total salary. Payments under this contract shall generally begin with the first regularly scheduled pay day following receipt by the Payroll Department of a properly executed payroll card, and first payment may be more than 38 days after the first day of work.

TERM

SEQN NO.	TITLE	DAYS

ESTIMATED SALARY $

IF ANY PART OF THIS NOTIFICATION OF TEACHING ASSIGNMENT IS IN ERROR OR YOU ARE UNABLE TO TEACH ANY OR ALL OF YOUR ASSIGNED CLASS(ES), PLEASE CONTACT YOUR DEPARTMENT ADMINISTRATOR OR DIVISION OFFICE AT

DEAN/DIRECTOR

DEPARTMENT CHAIRMAN/COORDINATOR

INSTRUCTORS COPY

APPENDIX D

Personnel Employment Authorization
(PEA)

PERSONNEL EMPLOYMENT AUTHORIZATION (P.E.A.)

TYPE OF AUTHORIZATION

___A. New Employee
Name of Employee Replacing _____

___B. Change of Job
___C. Additional Job
___D. Salary Increment
___E. Acct. No. Change
___F. Cost of Living Increase
___G. Other (Explain)_____
_____

DATE_____ 2 _____ SEQUENCE NUMBER

DIVISION_____ DEPT._____
LAST NAME _____
FIRST NAME _____
MIDDLE INITIAL _____
PAYROLL NUMBER _____
Leave Blank for New Employee

1. Social Security #_____
Is this a full-time student? Yes ☐ No ☐
(9 or more hours)

3. Budget Account no. _____ 6. Split Account? Yes___ No___ _____%

4. 1st Working Day this Authorization ___/___/___ 5. Fiscal Yr. _____-_____

7. Pay Type _____ (S) Salary (H) Hourly (D) Daily (F) Flat
If Salary, number equal installments _____
If Hourly, estimated total hours _____
usual hours per week worked _____
circle days per week worked: Su M T W TH F S
If Daily, Admin/Support or Special Schedule, estimated total days _____

8. Pay Rate $_____. *(If annual show annual rate)* Pay Shift Differential ☐ Yes ☐ No
Swing Shift _____
9. *Salary Schedule* _____ *Level* _____ *Step* _____ Night Shift _____

10. Authorized Amount $_____. *(If not annual salary basis)*

11. Ending Date ___/___/___ *(If not annual salary basis)*

12. Data Code _____ Regular Position
(0) Annual Contract Admin/Support
(1) Annual, Spec. Sched. Classified
(2) Temp. Part-Time Classified
(3) Annual Contract Barg.Unit Fac.
(4) Temp. Part-Time Faculty
(5) Spec.Agree. Soft Money w/Benefits
(6) Other

13. Position Title or Description of Work _____ *(EBI: Haz___ Veh___)*

If type of authorization is C. D. E. or F, not necessary to complete past this line.

27. PCC Ext. _____ PCC Location ___ ___ ___ ___
Campus Building Floor Room No.

Type of Employee Benefits:
PCCCA Classified ☐ (FT/Spec.Sched.)
PCCFF Faculty ☐
Admin/Support ☐

PT or Temp. Soft Money:
Legally Required Only ☐
See Attached Benefit Form ☐

"Soft Money" Project Information:
Project Name _____
Funding Dates from _____ to _____
If CETA Give Title # _____
Is Project Expected to be refunded?
Yes ☐ No ☐

Contract Status
Issue Contract? Yes ☐ No ☐
☐ Temp. Faculty Contract (180da.)
☐ 1st Probationary Faculty
☐ 1st Spec. Probationary Faculty
☐ Annual Admin/Support Contract
From (Date) _____ to _____
No. of Work Days _____

Issue Spec. Agreement Letter
☐ Yes ☐ No
Mark where applicable:
Subject to funding _____
Subject to enrollment _____
Other (detail) _____
(attach memo if necessary)

For Payroll Use

Dept. Chairman/Supervisor _____ *Personnel Approval:*

Dean/President _____ _____

Distribution: White - Personnel
Yellow - Payroll
Pink - Division
Goldenrod - Department

Retain LAST copy for Department files.
Send ORIGINAL (Signed by Dept. Chair. & Dean) and ALL OTHER COPIES to Personnel Office for processing.

APPENDIX E

Class Schedule Sheet
(4-ply)

☐ ADD ☐ CHANGE ☐ CANCEL

PORTLAND COMMUNITY COLLEGE

CLASS SCHEDULE SHEET

YEAR 19__ PAGE #____OF____

1 DIVISION_____
2 DEPARTMENT_____
PROGRAM_____
AUTHOR_____
DATE_____

APPROVED BY_____
DEAN

☐ WINTER
☐ SPRING
☐ SUMMER
☐ FALL

_____
CAMPUS

☐	SECTION NUMBER 4	COURSE NUMBER 5	CREDIT HOURS 4	CLOCK HOURS 4	CLASS TIME START TIME 6	CLASS TIME END TIME 6	DAYS 7	WEEKS 3	CLASS DATES* START 4	CLASS DATES* END 4	CLASS LIMIT 3	INSTRUCTOR NUMBER 9	INSTRUCTOR NAME 10	CAMPUS 2	BUILDING 3	ROOM 5	PAY TYPE 1	PAY SOURCE 1	COURSE TUITION 6	CALC MODE 1	SPECIAL CHARGE 5	CHARGE CODE 2	INSTRUCTION 2
	SHORT TITLE 14			EXPANDED TITLE 43																SPEC.CONT.CODE 1		PROG. CODE 1	
	SHORT TITLE 14			EXPANDED TITLE 43																SPEC.CONT.CODE 1		PROG. CODE 1	
	SHORT TITLE 14			EXPANDED TITLE 43																SPEC.CONT.CODE 1		PROG.CODE 1	
	SHORT TITLE 14			EXPANDED TITLE 43																SPEC.CONT. CODE		PROG.CODE 1	
	SHORT TITLE 14			EXPANDED TITLE 43																SPEC.CONT.CODE 1		PROG. CODE 1	
	SHORT TITLE 14			EXPANDED TITLE 43																SPEC.CONT.CODE 1		PROG. CODE 1	
	SHORT TITLE 14			EXPANDED TITLE 43																SPEC.CONT. CODE 1		PROG. CODE 1	
	SHORT TITLE 14			EXPANDED TITLE 43																SPEC.CONT.CODE 1		PROG. CODE 1	

EACH CLASS SCHEDULE SHEET MAY CONTAIN ONLY ONE TYPE OF TRANSACTION (I.E., ADD, CHANGE, CANCEL).

*NON-STANDARD TERM DATES
**TUITION NOT CALCULATED BY STANDARD CREDIT HOUR

White - Registrar Yellow - Registrar Pink - Department Goldenrod - Division

781518

APPENDIX F

Special Registration Form

Portland Community College
12000 S.W. 49th Avenue Portland, Oregon 97219 (503) 244-6111

SPECIAL REGISTRATION FORM

MUST BE ACCOMPANIED BY TUITION

NOTE: Registrations not paid by cash or check must be accompanied by written authorization from a firm or government agency.

HAVE YOU BEEN A RESIDENT OF THE STATE OF OREGON FOR THE PAST 90 DAYS? ☐ YES ☐ NO

X _____ SIGNATURE

DEPT	COURSE NO	SECTION NO	COURSE TITLE	ROOM	CENTER OR BUILDING	COST

SOCIAL SECURITY NO. _____

YEAR 19 ____ TERM ____ ☐ SPRING ☐ FALL ☐ SUMMER ☐ WINTER ☐ A.Y

☐ SR CITIZEN ☐ PRE REG ☐ CHECK ☐ CASH ☐ MAIL ☐ PROGRAM ☐ MONEY ORDER

LAST NAME

FIRST NAME | INITIAL

ADDRESS

CITY | STATE | ZIP CODE

REMARKS — DO NOT WRITE IN THIS AREA

CR HOURS _____
CURR CODE _____
BILLING CODE _____
CK NO _____

TELEPHONE NUMBER
DAY
EVE

TUITION CHARGES	
SPECIAL CHARGE / CODE	
TOTAL CHARGES	
AMOUNT PAID	
BALANCE	
DATE / CLERK #	

FEDERAL REGULATIONS REQUIRE THAT THE FOLLOWING DATA BE COLLECTED BY SCHOOLS THAT RECEIVE FEDERAL AID. PLEASE CHECK THE CATEGORY THAT YOU FEEL BEST FITS YOU:

☐ AMERICAN INDIAN/ALASKAN NATIVE (04) ☐ ASIAN OR PACIFIC ISLANDER (03) ☐ BLACK (02)
☐ FOREIGN NATIONAL/NON-RESIDENT ALIEN (05) ☐ HISPANIC/SPANISH SURNAME (01) ☐ WHITE (00)

(CHECK ONE) ☐ MALE ☐ FEMALE

DATE OF BIRTH

791600

APPENDIX G

Evaluation Form
(Student)

Portland Community College
12000 S.W. 49th Avenue Portland, Oregon 97219 (503)244-6111

Evaluation Form

Custom Designed Program

Portland Community College

Date

Program Title

Instructor/Coordinator

Circle the number that most applies	Strongly Agrees = 4			Strongly Disagrees = 1
1. The objectives of the program were clear to me.	4	3	2	1
2. My needs were met by the program.	4	3	2	1
3. The session(s) followed a logical pattern.	4	3	2	1
4. The information presented was valuable to me.	4	3	2	1
5. Handout materials were meaningful.	4	3	2	1
6. The instructor was knowledgeable and well prepared.	4	3	2	1
7. The facilities were satisfactory.	4	3	2	1

Circle the number that best reflects your opinion of the <u>overall</u> <u>effectiveness</u> of this program.	Very Effective = 4			Ineffective = 1
	4	3	2	1

1. This is my first PCC custom designed program. Yes ____ No ____
2. How did you learn about this program?
3. How was the program valuable to you in terms of your own professional growth?
4. What do you suggest as possible topics for other programs?
5. If you were the organizers of this program, what do you think needs to be done differently?

COLLEGE BOARD: Father Bill Hamilton, *chairman* • Earl Blumenauer • Howard Cherry • N. Becky Mansfield • Lynda A. Mayo • Carl Piacentini • Jeannette Saucy
PRESIDENT: John H. Anthony

APPENDIX H

Staff Evaluation Form

Portland Community College

Staff Evaluation

Custom Designed Program

Date _____ Program _____

Please respond to these inquiries as they relate to your program and/or delivery system.

1. Facilities

2. Length of Program

3. Did you accomplish the desired results?

   Explain:

4. What was your greatest challenge?

   Explain:

5. Suggestions for improvement

OCT 16 1981

ERIC Clearinghouse for Junior Colleges
96 Powell Library Building
University of California
Los Angeles, California 90024

Please use the back of this paper or additional sheets for your comments.